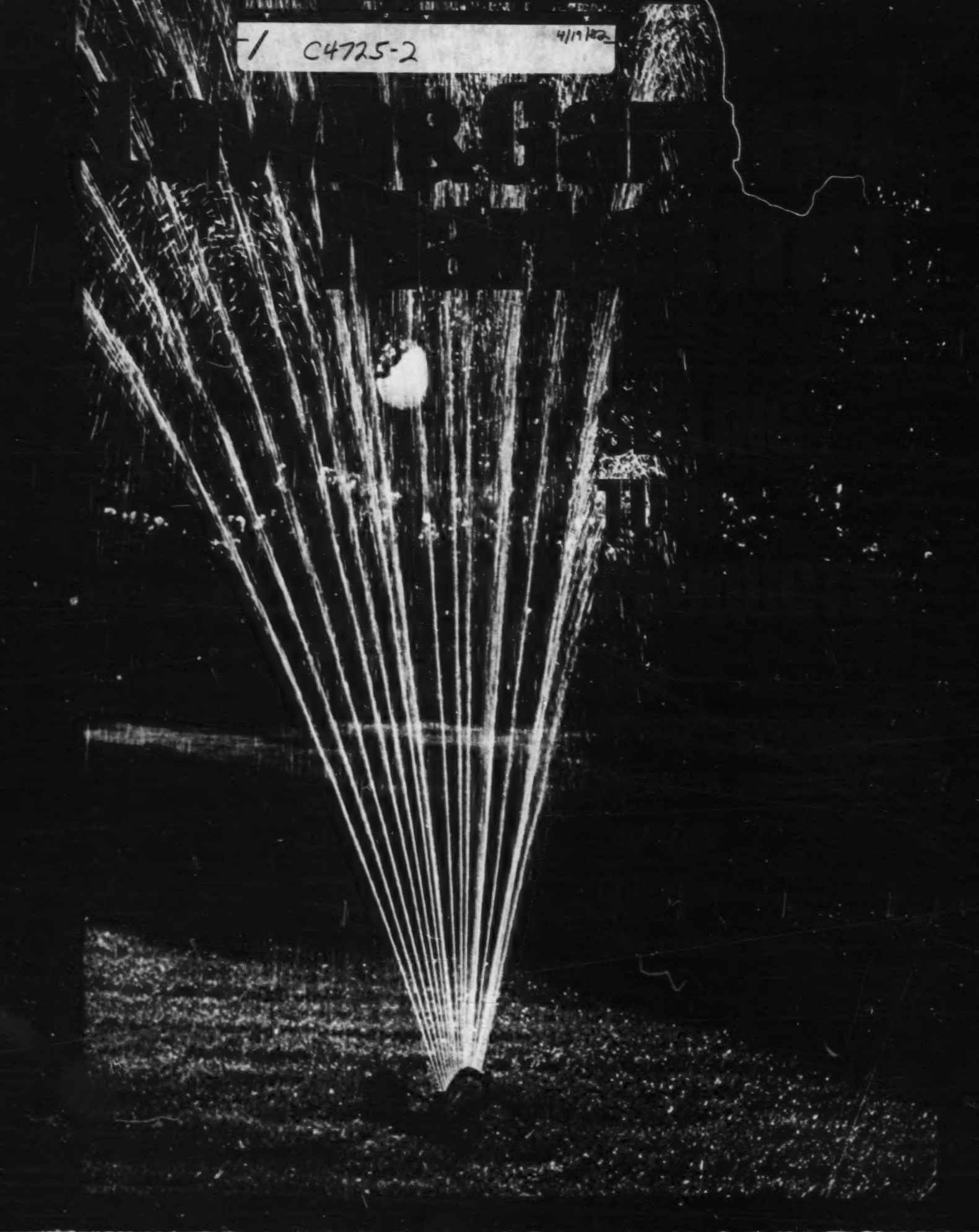
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Lawn&Garden Marketing

The merchandising magazine for lawn, garden and leisure living products.

4 **Product movement report: autumn.** In this second of a series, retailers report sales of eight autumn product lines.

Retailer's guide to selling turf products:

14 **Fertilizers, chemicals, soil conditioners.** This report describes the effects of inflation, the move to the Sun Belt and the impact of lawn service contractors on retailers. Also included: tables of data from Frost and Sullivan Inc. on the market for fertilizer and pesticides. By Wendall Burns.

16 **Sorting out the confusing lawn seed picture.** Seeds are described by type according to problems solved for climates and conditions. New U.S.-developed, improved turfgrass varieties result from the "breeders' rights" legislation, early 1970s. By Jerry Johnson.

24 **Quality counts big with watering products.** Manufacturers discuss trends, changes and strategies to expect in the 1982 market. By Marjorie Riggin.

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Coming in the March issue: Major advertising and promotion campaigns described. One article will describe how Florida Tractor Corp. is working with manufacturers and retailers to stimulate sales of outdoor power equipment in 1982. Another article will feature ad plans of manufacturers of selected high volume, problem-solving merchandise. Also: The many uses of mulches.

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Product Movement Report, Autumn, 1981

This quarterly feature provides data from retailers responding to a survey conducted by Lawn & Garden Marketing concerning sales in eight categories of autumn merchandise.

■Seven of the eight product categories in Product Movement Report for Autumn, 1981 reflected the economy in general: sales were down and holdover inventory was up over 1980. Fall bulbs were the only products showing an increase in sales volume. And that increase was substantial: 25 percent. One retailer responding to the survey said the increase in bulb sales was due to a more knowledgeable

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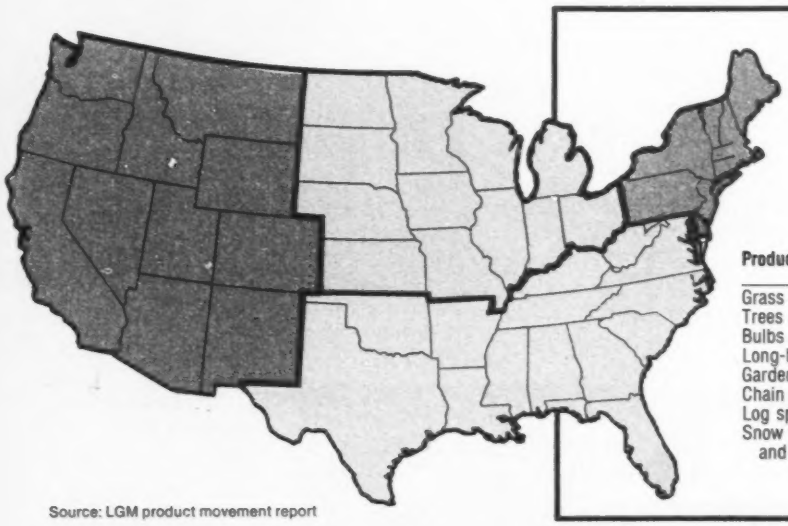

Source: LGM product movement report

NATIONAL

Product Category	Percent Change 1981 vs 1980 Sales	1981 vs 1980 Inventory
Grass seed	−7.0	+8.0
Trees and shrubs	−12.4	+20.0
Bulbs	+25.3	+18.8
Long-handled tools	−9.5	+26.1
Garden carts/wheelbarrows	−30.7	+11.1
Chain saws	−21.2	+7.9
Log splitters	−36.0	−4.8
Snow throwers (Northeast and North Central only)	−25.0	0.0

WEST

Product Category	Percent Change 1981 vs 1980 Sales	1981 vs 1980 Inventory
Grass seed	−37.5	+344.4
Trees and shrubs	+50.0	-0-
Bulbs	+16.7	-0-
Long-handled tools	−23.3	−15.3
Garden carts/wheelbarrows	+48.9	+39.7
Chain saws	−6.4	-0-
Log splitters	−150.0	−5.9
Snow throwers	NA	NA

NORTHEAST

Product Category	Percent Change 1981 vs 1980 Sales	1981 vs 1980 Inventory
Grass seed	+50.0	−25.1
Trees and shrubs	−40.0	+400.0
Bulbs	+25.0	NA
Long-handled tools	+3.0	+28.3
Garden carts/wheelbarrows	-0-	−33.3
Chain saws	−4.8	+5.3
Log splitters	−30.0	−3.7
Snow throwers	−45.5	+5.6

NORTH CENTRAL

Product Category	Percent Change 1981 vs 1980 Sales	1981 vs 1980 Inventory
Grass seed	+4.7	-0-
Trees and shrubs	−12.5	+400.0
Bulbs	-0-	+50.0
Long-handled tools	−4.4	−10.9
Garden carts/wheelbarrows	−20.0	+33.3
Chain saws	−35.4	+20.0
Log splitters	−39.3	−13.0
Snow throwers	−11.1	−5.4

SOUTH

Product Category	Percent Change 1981 vs 1980 Sales	1981 vs 1980 Inventory
Grass seed	−40.0	+80.2
Trees and shrubs	−9.1	−22.2
Bulbs	+28.6	+24.5
Long-handled tools	−22.5	+40.8
Garden carts/wheelbarrows	−36.2	+22.5
Chain saws	−17.2	+6.0
Log splitters	−240.0	-0-
Snow throwers	*NA*	*NA*

continued...

public. Bulbs showed an increase in three of the major census regions: the Northeast, South and West. Only in the North Central states did sales of these product fail to show an increase.

The Northeast

Grass seed sales also fared well in the Northeast, showing an increase of 50 percent; there was a 25 percent decrease in holdover inventory by the reporting retailers. Long-handled tools showed a small increase in sales volume. The power equipment items, which in recent years have meant good dollar volume in the Northeast—chain saws, log splitters and snow throwers—trailed off this year, with sharp decreases from last year.

Retailers from the Northeast cited some of the reasons for good volume in sales of some products. People were looking for closeouts on lawn mowers and grills for Christmas. They were attracted by promotional prices on top seasonal items such as bamboo rakes and large leaf bags. Attachments for mowers for leaf pickup as well as other leaf cleanup equipment and accessories also moved well.

Favorable weather stimulated the sale of seed and fertilizer in the region.

Sale prices have been the "only approach" said some of the respondents. "We distributed two flyers in September and October of 1981 whereas we distributed only one flyer in 1980," said another respondent who reported a significant increase in volume of bulbs, grass seed, tools and garden carts. "We have had a decent fall season and we look forward to a banner spring season," said this retailer.

Another retailer, an independent, said the increased price is depressing sales of bulbs, with less unit volume each year. At the same time he credited good weather and sale prices with helping to move merchandise.

Another dealer said that even promotional prices did not spur sales. Customers were buying only what they needed, he lamented.

From Pennsylvania, a garden center manager reported that a statewide "Fall is for Planting" campaign, coupled with his firm's usual fall-planting push, helped to sustain sales. Bulbs, crafts and cut-flower sales were exceptionally good, but nursery stock and mulches were down. "Our competition forced us into an annual container clearance sale sooner than we'd have liked," he commented.

North Central states

The sales picture in the North Central states was even bleaker than in the Northeast. Heavy rains in some areas, and the general economy, kept the sales volume below last year's movement except for one product line—grass seed—which showed about a five percent increase for the region.

Some other sections of the North Central region, however, credited good grass seed weather and "reasonable" prices as stimulus for improved volume. One retailer reported excellent weather for seeding grass which offset the depression in housing starts in his trade territory.

"Our fall mail circular kept our sales up over last year," said a Minnesota retailer. For one Michigan retailer, the best increases were in fertilizer and lawn rakes, but the weather turned bad early and that, matched with the sluggish economy, prohibited any significant gains.

"Nothing could influence sales this fall due to the economic conditions. No ads helped," said an Illinois retailer.

A dealer who sold 78 snow throwers in 1979 and six in 1980 sold only two of the units in Fall, 1981. "No snows. Banana-belt temperatures," he explained. At the time of his response to the survey, he had 36 snow throwers still in inventory.

An Ohio dealer reported that "People going out of business were selling their chain saws at below dealer cost," hurting his sales volume.

A Wisconsin dealer complained of cut-rate competition, noting that his chain saw sales dropped from 125 in the fall of 1980 to 60 in the fall of 1981.

A consistent advertising campaign enabled an Ohio dealer to reduce his snow thrower and chain saw inventory. He sold 150 snow throwers in the fall of 1981, compared to 35 the previous fall. But, he still had 150 units in inventory. He increased chain saw sales from 20 units to 35 units in fall, 1981, but still had 120 on hand.

Unemployment frequently was cited by dealers, especially in Michigan, as the reason for reduced sales volume.

A big assist in their overall sales picture for many of the retailers in the North Central region was the demand for kerosene heaters.

The South

Despite reduced prices on grass seed, sales of this product line in the South were down 40 percent compared to autumn, 1980. Although many areas reported favorable weather, a Ft. Worth retailer said that heavy rains during the month of October hurt his sales. Several respondents from the South reported good sales of vegetable garden seeds. A North Carolina respondent reporting good garden and grass seed volume, also commented that "There was a bigger interest in bulbs this year, yet they were more expensive than ever."

A dry fall in Tennessee discouraged some planting. But one volume retailer there credited a special promotion on chain saws with increasing chain saw sales from 100 units in the fall of 1980 to 150 for the comparable period of 1981.

A home center in Georgia reported that the dry season helped move hose and other watering items off the shelves.

In Florida, a power equipment specialty retailer said that weather—little rain and an early cold spell—stopped growth of grass and resulted in poor sales of mowers. But Snapper's thatcherizer attachment attracted buyers to that brand of mowers. Sales of other mower lines did not meet his expectations, he said. Other Florida power equipment dealers noted a downturn in sales.

A Louisiana garden center operator reported that good weather, a good economy and aggressive advertising helped increase business.

Bedding plants and container stock produced exceptionally good

...continued

The "Best Seller" list

The following products were mentioned by retailers as having generated exceptionally good sales in the Fall, 1981 season.

Northeast

Grass seed
Bulbs
Fertilizer
Fall/winter fertilizer
Pots
Rakes
Mulches
Winter protection
Burlap for winter protection
Lawn mowers
Lawn mower parts
Bird feeders
Chain saws
Chain saw accessories
Greenlawn Plus
Log splitters
Lime
Shade trees
Evergreens
Hedge materials
Large leaf bags
Lawn and garden tractors
Snapper mowers, accessories
Riding mowers
Wheelbarrows
Tillers
Mulching mowers
Leaf blowers and vacs
Jacobsen
Homelite
Hand mowers
BBQ grills

North Central

Grass seed
Fertilizer
Leaf blowers and vacs
BBQ grills (Christmas gifts)
Shade trees
Shrubs and hedge
Leaf bags
Lawn and garden tractors
Snapper mowers and accessories
Riding mowers
Wheelbarrows
Bird feeders
Chain saws
Chain saw accessories
Log splitters
Garden hose
String trimmers
Carts
Snow throwers
Pesticides
Lawn tractors/mowers
S o d
Axes and handles
Top soil
Sprinklers
Lime
Tillers
Garden seed
Potting soil
Kerosene heaters
D-Con
Air-cooled engine parts
Snowmobiles
Dixon mowers
Lawn-Boy mowers
Snow blades

South

Grass seed
Bulbs
Fertilizer
Pots
Mowers
Rakes
Mulches
Tillers
Leaf blowers and vacs
Hand mowers
Snapper mowers, accessories
Riding mowers
Fall fertilizer
Chain saws
Garden hose
Chain saw accessories
String trimmers
Pesticides
Lawn tractors/mowers
Axes and handles
Sprinklers
Garden seed
Potting soil
Kerosene heaters
Snow blades
Bedding plants
Splitting mauls and handles
Wedges
Files
Soil conditioner
Baled peat
Vegetables
Garden sprayers
Soil testing
House plants
Service and repair
Indoor plant food
Hand tools
Fertilizer spreaders

West

Grass seed
Bulbs
Fertilizer
Mowers
Rakes
Shade trees (seedlings)
Shrubs, hedges
Chain saws
Garden hose
String trimmers
Pesticides
Long handled tools
Garden seed
Kerosene heaters
Snow shovels
Bulb food
Engines
Loppers

Product movement

...continued

sales, but field-grown materials, fertilizer and chemicals did not come up to expectations, he said.

One retailer from Kentucky reported that sales were down 23 percent. Practically all merchandise in his garden center was down in sales, he said. The spring and summer sales also were "not great" due to a coal strike and May rains. He commented, however, "Our community has a diversified economy and should be relatively stable. I honestly believe the newspapers and TV create some slowdown in sales by their incessant doomsday headlines."

The West

In the West, sales of trees and shrubs were up to 50 percent, bulbs were up 17 percent and garden carts/wheelbarrows were up 49 percent. Grass seed sales were down 38 percent and sales of chain saws were down seven percent.

In the Seattle area, one company reported promoting fall fertilizers and seed more heavily than usual to compensate for the lack of installations of new lawns. Reseeding and improving old lawns did increase and helped to offset the loss of the new housing starts, but not enough to bring volume of seed sales up to the previous year. This dealer, however, did report exceptionally good sales of fall fertilizer, lime, gas weed trimmers, barbecues and accessories.

Another Seattle area retailer reported exceptionally good sales in lawn mowers. He noted, however, that the buyers were also shoppers. They had been into the store previously, beginning in June, and 80 percent of the sales were to customers who had been looking since June and returned to his store to buy. He had offered no special prices and attributed the success to providing quality equipment and serving customer needs. His chain saw sales were down, though. In some areas of Washington and Oregon, the retailers reported that the depressed "timber economy" has hurt them.

Respondents from California, with a few exceptions, reported sales were down and blamed the economy. □

Power Equipment Highlights

Vol. 3 No. 2 February 1982

OPEI reports across the board decline of key lawn and garden shipments

Twelve-month shipments by reporting members of the Outdoor Power Equipment Institute statistical program declined 20.6 percent when compared with the same period in 1980.

The 4.6 million walk-behind power mowers shipped in 1981 compares with 5.7 million units in the 1980 model year. Factory values declined from $701 million to $606 million, or 13.6 percent.

Shipments of riding garden tractors declined 31.4 percent to 151,000 units having a F.O.B. value of $453 million. Last year's 220,000 units were valued at $605 million.

Estimated shipments of lawn tractors/riding mowers totalled 620,000 for the 1981 model year, down 23.3 percent from 1980. F.O.B. factory value also dropped to $453 million or 14.5 percent less than 1980 values.

Rotary tiller shipments were off 24.9 percent to 501,000 units, a decline of 166,000 units from the 667,000 shipped in 1980. Factory value decreased 13.2 percent from $159 million to $138 million.

The twelve-month across the board declines can be attributed in part to high interest rates and a decline in household spending. The twelve-month period began in September 1980 and ended Aug. 31, 1981. Companies participating in the OPEI statistical reporting program accounted for a vast majority of total industry shipments of the above products.

Historical Data (Revised)—1980

Product	Unit Shipments 1980	1979	Change %	F.O.B. Shipment Value 1980	1979	Change %
Walk-Behind Power Mowers	5,700,000	5,900,000	– 3.4%	$ 701 MM	$ 656 MM	+ 7.0%
Lawn Tractors/Riding Mowers	808,000	858,000	– 5.8%	530 MM	493 MM	+ 7.5%
Front Engine	494,000	515,000	– 4.1%	345 MM	311 MM	+10.9%
Rear Engine	314,000	343,000	– 8.5%	185 MM	182 MM	+ 1.6%
Riding Garden Tractors	220,000	254,000	–13.4%	351 MM	365 MM	– 3.8%
Rotary Tillers	667,000	571,300	+16.8%	159 MM	125 MM	+27.2%
	7,395,000	**7,583,000**	**– 2.5%**	**$1,741 MM**	**$1,639 MM**	**+ 6.2%**

Complete List of Key Lawn and Garden Shipments—1981 Model Year (Estimated)

Product	Unit Shipments 1981	1980	Change %	F.O.B. Shipment Value 1981	1980	Change %
Walk-Behind Power Mowers	4,600,000	5,700,000	–19.3%	$ 606 MM	$ 701 MM	–13.6%
Lawn Tractors/Riding Mowers	620,000	808,000	–23.3%	453 MM	530 MM	–14.5%
*Front Engine	370,000	494,000	–25.0%	291 MM	345 MM	–15.7%
*Rear Engine	250,000	314,000	–20.4%	162 MM	185 MM	–12.6%
Riding Garden Tractors	151,000	220,000	–31.4%	266 MM	351 MM	–24.2%
Rotary Tillers	501,000	667,000	–24.9%	138 MM	159 MM	–13.2%
	5,872,000	**7,395,000**	**–20.6%**	**$1,463 MM**	**$1,741 MM**	**–13.9%**

*Subtotals

It's now *Snapper* P.E.

"Snapper Mac", the longtime symbol in outdoor power equipment, fulfilled the adage "If you think enough of something, you will put your name on it" by becoming part of the recently renamed Snapper Power Equipment.

"Our long-term sense of pride in Snapper has led us to rename McDonough Power Equipment, Snapper Power Equipment. Our new name will enhance our visibility and reaffirm our commitment to independent distributors and dealers, and customers", according to A. A. Malizia, chairman.

Snapper Power Equipment was founded in 1890 as Southern Saw Works. The company became McDonough Power Equipment with the 1956 relocation to McDonough, Ga. Snapper Power Equipment manufactures outdoor power equipment for all 50 states and 30 foreign countries.

Snowthrower sales snowball in Europe

Early October and November snows in Europe have resulted in a flurry of sales of American-built snowthrowers, according to the Simplicity Manufacturing Co. Simplicity is an Allis-Chalmers company.

Introducing line for heavy snow

G. Christopher Covert, manager, International Marketing, said that international sales of all Simplicity powered equipment have been rising steadily for the last five years. For this winter season, Simplicity introduced a new line of snowthrowers built specifically for European heavy, wet snow conditions. Especially popular has been the 10 horsepower model with an 80 centimeter (32 inch) clearing width, which also has seen limited distribution in the United States.

Fertilizers, chemicals, soil conditioners

A big, important market that requires close management in 1982.

By Wendell Burns

■The consumable supplies for lawn maintenance—fertilizer, herbicides, insecticides, soil conditioners—comprise an important segment of the lawn and garden retail market and merit special attention by retailers this year.

Lawn care supplies continue to be the strong suit of the industry. Despite some tapering off of unit volume growth due to inflation, recession and the downturn in housing, the above-described bagged-and-bottled consumables are the bread-and-butter merchandise for most retailers of home horticulture products. Even so, this is an industry segment which needs careful grooming during these times of dramatic economic, social, political and marketing changes which are impacting the public. Home owners are re-evaluating how to invest their financial resources as well as their time. It is likely they will continue to view the care of their homes, including the lawn and exterior, with ever greater care; and they're buying and working smarter.

Effects of inflation

Retailers reported last year that their customers were more price-conscious, and that many would purchase a smaller bottle of herbicide or a less expensive bag of fertilizer than they would have in previous years. Likewise, because of high costs the trend to less vacation travelling continues. On the brighter side, this has resulted in customers' spending more time on lawn care, gardening and other DIY projects. This stretches out the lawn and garden season, although not adding much to total unit sales volume at the end of the season. Most of the volume retailers gear their merchandising strategies to getting the cream of the crop during the peak selling season. They base their inventory on sales in previous years, and stock only the high-turn items.

Some categories of do-it-yourselfers match their lawn feeding and herbicide application schedules to coincide with the price-promotions by the mass retailers. Others, who value their time more than the dollars saved on sales prices, turn to the specialty retailer, from whom they can get advice along with the basic fertilizer and pesticide combinations, and possibly also borrow or rent a fertilizer spreader. They bring their questions and sometimes samples of grass along to have an on-the-spot diagnosis from the lawn and garden expert which many specialty garden centers have working on the floor throughout the year.

Many garden center owners and managers said they held their own, or increased volume a little last year by working harder and longer hours. Although no exact unit data is available, it is believed that the volume retailers continue to gain market share in sales of lawn fertilizers and herbicides because of the increased numbers of chains of retailers which are expanding their offerings of home horticultural merchandise. In short, there are more of the chain stores within easy access to the suburban shoppers who comprise the major market for lawn products.

Market data

According to a study published in 1981 by Frost & Sullivan Inc., a market research firm, only about 40 percent of the nation's 51 million home lawns are regularly fertilized. A summary of this study stated that only about 20 percent of the lawns in the New York-New Jersey area are treated with pesticides, whereas over 60 percent of the home lawns in California and Arizona are treated with pesticides. It attributed this regional data to studies by the EPA. Many of the sun belt states, which are enjoying population growth and economic growth despite stagnation in the rest of the country, are giving

Table 1.
Professional lawn care markets

Product	1979	1982	1985	1988
	(Millions of Constant Dollars)			
Fertilizers	414.34	448.74	486.46	526.87
Micronutrients	381.1*	410.3*	442.8*	477.7*
Fungicides	72.84	79.39	84.28	89.44
Herbicides	20.43	21.68	23.01	24.41
Insecticides	62.98	66.83	70.92	75.27

*-Thousands of Constant Dollars.

Source: Frost & Sullivan, Inc.

Table 2.
Ornamentals and house plant markets

Product	1979	1982	1985	1988
	(Millions of Constant Dollars)			
Fertilizers	47.4	63.0	87.2	111.6
Micronutrients	5.97*	7.95*	10.58*	14.08*
Fungicides	0.99	1.33	1.77	2.52
Insecticides	0.67	0.89	1.19	1.72

*-Thousands of Constant Dollars.

Table 3.
Home garden markets

Product	1979	1982	1985	1988
	(Millions of Constant Dollars)			
Fertilizers	41.0	46.1	51.9	58.3
Micronutrients	56.94*	62.25*	68.00*	74.29*
Fungicides	8.06	8.76	9.52	10.41
Insecticides	6.15	6.67	7.24	7.87

*-Thousands of Constant Dollars

the national marketers of lawn fertilizer and chemicals new hope for maintaining sales volume at a profitable level, although requiring some change in product and marketing strategies.

The current and estimated future markets for fertilizers, micronutrients and pesticides for home and professional lawn care as projected by the Frost & Sullivan study are seen in Table 1.

Changes to manage

The changes in merchandising turf products include stagnation in some areas where high unemployment has impacted local economics. However, there are other areas of solid growth—Texas and other sun belt states, for example.

The influx of customers to the Sun Belt from other regions means good business for the servicing retailers who are prepared to educate the newcomers to local practices for successful lawn care. There also are new seeds being introduced which require special training of retail personnel so they can explain the seeding and fertilizing of the new varieties.

Retailers continue to lose some of their sales of fertilizer, pesticides and application equipment because the demand for these items has been diminished by the professional lawn care services. An estimate given at the Texas Turfgrass Conference in December was that 7.7 million homes in the United States used professional lawn care services in 1980. The servicing dealers have responded to this drain on their business in a number of ways, including offering an application service themselves; or accepting the reduction in fertilizer sales and switching to other lines. There also are reports of successfully switching more customers to using liquid fertilizers which they have seen the contract servicers use so effectively. The latter approach offers some definite savings to customers who are willing to try it.

Selling the problem solvers

Merchandising lawn fertilizers is a pretty cut-and-dried function for both the independents and chain stores. Innovative retailers who want to go beyond the routine-and-obvious find good opportunities in specializing by selling the problem solvers. This includes heavy promotions on the pre-emergent herbicides for dandelions and other broadleaf weeds, for crabgrass and various insecticides. They also can win customers' confidence by showing displays or photos of problem soils in their respective geographic regions, and merchandising peat moss, gypsum or other appropriate soil conditioners to make their customers' lawn-care efforts more successful. □